

## Quick Reference for Guardians/Conservators

The anniversary date of your appointment is: \_\_\_\_\_

You have been appointed as: \_\_\_\_\_

Below is a list of duties that need to be completed within the time lines noted. The time frames listed refer to the anniversary date of your appointment listed above.

- Inventory (Within 90 days of appointment):  
This form is filed only one time and it lists all of the money, property and other assets that your ward had at the time you were appointed.
- Annual Report of Guardian on Condition of Ward (Yearly, within 30 days after the anniversary date):  
If you are a Conservator only, you need not complete this report. Each year, this form is completed to update the Court regarding your activities with and on behalf of the Ward and to report on their condition.
- Annual Accounting/Statement of Assets (Yearly within 30 days after the anniversary date):  
If in your initial Inventory, you reported assets other than financial assets, such as personal property, real estate, etc. you must annually complete this form including the status of those assets.

In addition, this form provides a complete accounting of the Ward's financial assets and must be provided to the Court. The Court needs to know about all deposits made and checks written, who it was written to and what it was for. A sample form is provided for you to use as a guide to keep track of income and expenses. Completing this form regularly will help with completing your annual reports.

**\*\*Please note that if there is a separate Conservator or if you have chosen someone else to be a Payee for benefits for the Ward, you do not need to complete the report for the assets handled by a Conservator or Payee.**

- Certificate of Proof of Possession (Yearly, filed with Annual Accounting/Statement of Assets):  
This form needs to be completed and then taken to each financial institution where a Ward's account is located and signed by that institution.

Please note: There is a Court filing fee due with the annual reports. Currently the fee is \_\_\_\_\_.

A copy of each of these forms is included in your packet. It would be helpful if you would make copies before using the original so that you will have them for future use.

### REMEMBER:

- NEVER co-mingle the money of the Ward with your personal accounts. If necessary, immediately open new accounts.
- You may not pay yourself any money from the Ward's accounts without first receiving permission from the Court. This includes any money for living expenses, if the Ward lives with you.
- Notify the Court if either you or your Ward has a change of address.
- If you fail to file any of the reports above on time, you will receive an Order to Show Cause requiring you to appear in Court to explain why the report(s) were not filed. If you complete the forms prior to the date set for the hearing, the hearing will be cancelled and you will not need to appear.

***ON REVERSE... Quick Reference for Conservators with a CD Only***

## Quick Reference for Conservators with a CD Only

The anniversary date of your appointment is: \_\_\_\_\_

You have been appointed as: \_\_\_\_\_

You have a duty to file an annual report with the Court.

- Certificate of Proof of Possession (Yearly, filed with Annual Accounting/Statement of Assets):  
This form needs to be completed and then taken to each financial institution where a Ward's account is located and signed by that institution.

Please note: There is a Court filing fee due with the annual reports. Currently the fee is \_\_\_\_\_. A copy of each of this form is included in your packet. It would be helpful if you would make copies before using the original so that you will have them for future use.

### REMEMBER:

- Notify the Court if either you or your Ward has a change of address.
- If you fail to file any of the reports above on time, you will receive an Order to Show Cause requiring you to appear in Court to explain why the report(s) were not filed. If you complete the forms prior to the date set for the hearing, the hearing will be cancelled and you will not need to appear.
- When the minor reaches the age of 19, he/she will need to come to our office with a copy of his /her birth certificate or driver's license, sign of Receipt and Release form, pay any court costs that may be due and the Certificate of Discharge will be issued which can be taken to the bank to receive the funds.